



## **Job Aid:**

### **How to Create a Bid Using a Requisition**

#### **This Job Aid shows how to:**

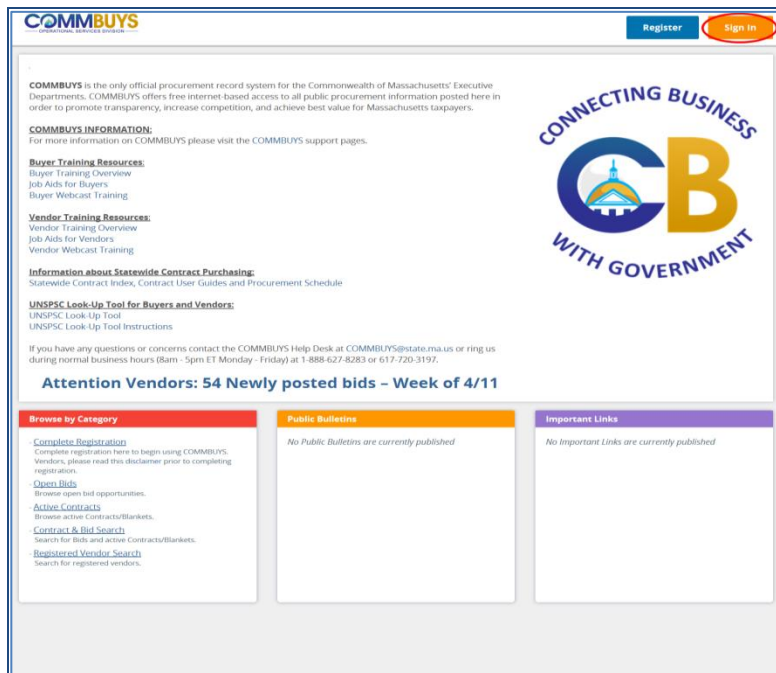
- Create an Open Market Requisition in COMMBUYS
- Convert a requisition to a bid

#### **Of Special Note:**

Bids are documents used to request price quotes from potential vendors for goods or services. Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket Purchase Order (MBPO) in COMMBUYS (formerly known as a contract or Master Agreement).

## Job Aid: How to Create a Bid Using a Requisition

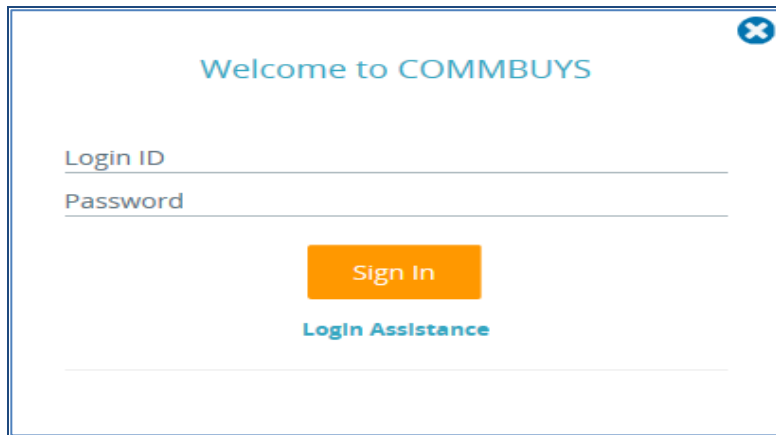
### Screenshot



### Directions

#### Step 1: Logging in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.

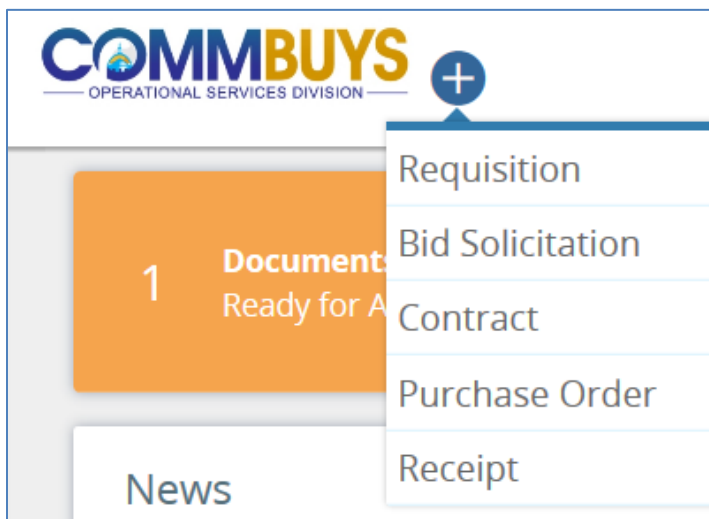


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#### Step 2: Creating a New Requisition

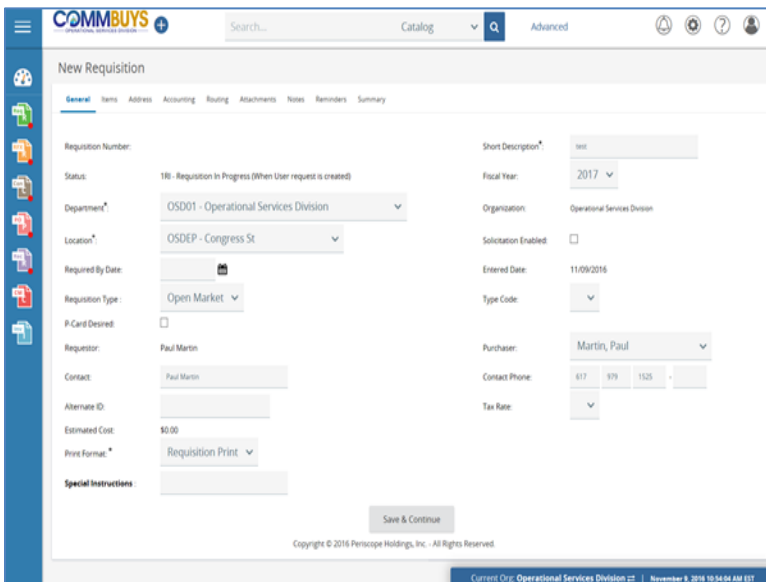
1. Click on the **Add Documents** (plus sign) icon.
2. Select **Requisition** from the dropdown menu.



#### Step 3: Completing the Requisition General Tab (left side)

The General tab for the requisition displays. Fields marked with an asterisk (\*) are required fields. On the left side of the screen, complete the following fields:

- **Department:** Defaults from the user profile. May be changed using the dropdown if other departments are available to the user.
- **Location:** Defaults from the user profile. May be changed using the dropdown if other locations are available to user.
- **Required by Date:** Optional field.
- **Requisition Type:** Open Market
- **Requester:** The user that created the requisition. This field cannot be edited.
- **Contact:** The contact for this requisition.
- **Alternate ID:** Enter information as required. This may include (but is not limited to) data such as a MMARS encumbrance ID or Enterprise Resource Planning (ERP)/Accounting system transaction numbers for non-MMARS users.
- **Estimated Cost:** Calculated by COMMBUYS; not editable by the user.
- **Special Instructions:** Enter information as required. This may include (but is not limited to) data such as shipping drop off info, locations, additional contacts, etc.



The screenshot shows the 'New Requisition' form in the COMMBUYS system. The 'General' tab is selected. The form contains various fields for requisition details. Fields marked with an asterisk (\*) are required. The 'Requester' field is populated with 'Paul Martin'. The 'Contact' field is also populated with 'Paul Martin'. The 'Estimated Cost' is \$0.00. The 'Print Format' is set to 'Requisition Print'. The 'Save & Continue' button is at the bottom right. The footer shows 'Copyright © 2016 Perscope Holdings, Inc. - All Rights Reserved' and 'Current Org: Operational Services Division 27'.

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#### Step 4: Completing the Requisition General Tab (right side)

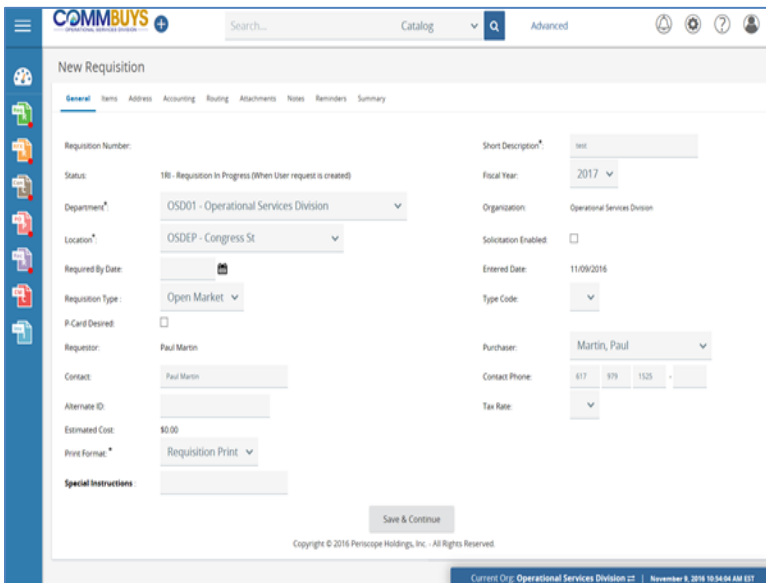
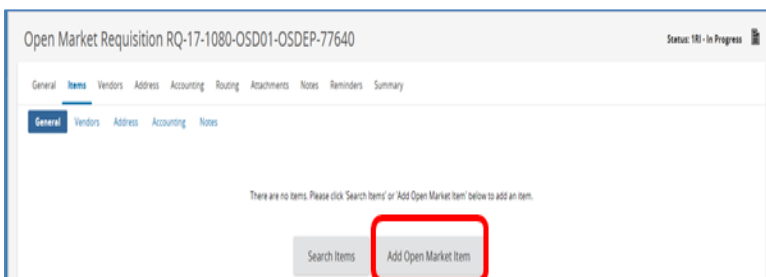
On the right side of the **General** tab, complete the following fields:

- **Short Description:** Be specific as this field is also used as search criteria to locate a requisition. May use any Departmental Identifier numbers.
- **Fiscal Year:** Defaults to the current Fiscal Year.
- **Organization:** A default value based on your user profile and can only be changed by an administrator.
- **Solicitation Enabled:** Only select if this is not an open market requisition.
- **Entered Date:** Defaults to the current date and cannot be changed.
- **Type Code:** Type options are based upon the requisition type.
- **Purchaser:** Defaults to your name. Use the dropdown to select a different purchaser.
- **Contact Phone:** Defaults to the profile value. Can be updated as needed.
- **Tax Rate:** N/A for Commonwealth use.

When complete, click on the **Save & Continue** button to save the information entered on both sides of the General tab.

#### Step 5: Adding Items to the Requisition

1. To add items to the requisition, click on the **Items** tab.
2. Click on the **Add Open Market Item** button to begin the process of adding items to the requisition.

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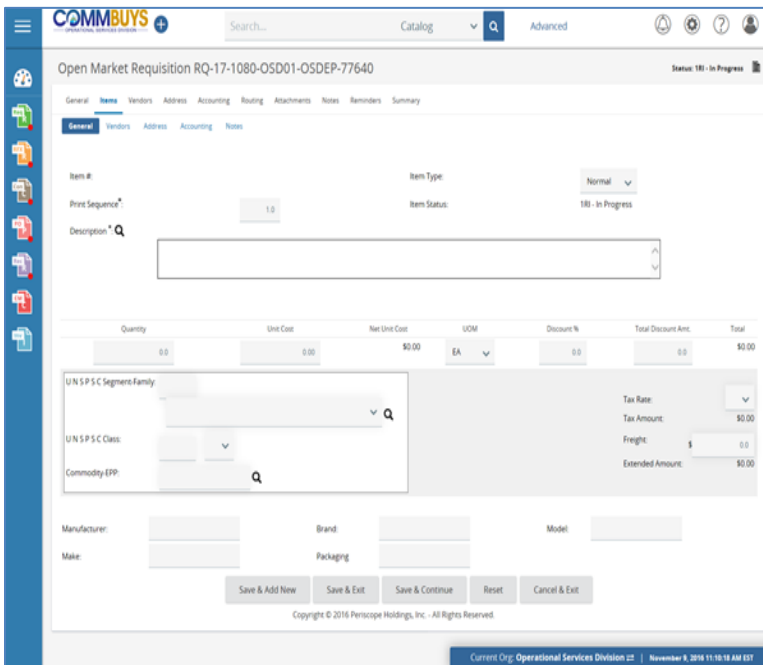
#### Step 6: Completing the Items General Tab

The **Items** tab opens to a blank entry form to add either an Open Market or Narrative item to the requisition.

The following are fields that should be completed for an open market item:

- **Item #:** COMMBUYS automatically sequentially numbers each item added to the requisition
- **Item Type:** two options:
  - **Normal** – default value
  - **Narrative** – permits the addition of a non-item to allow an additional description to appear on the requisition
- **Print Sequence #:** change this field if the order of printing the line items should change from the Item # order
- **Item Status:** COMMBUYS automatically updates based on the requisition status.
- **Description:** description of the item or service; can hold up to 100 characters.
- **Quantity:** enter quantity if known or enter 1 if unknown
- **Unit Cost:** enter cost of item/service per 'unit' of quantity
- **Net Unit Cost:** COMMBUYS automatically updates
- **UOM:** unit of measure; how the item is sold/packaged/purchased
- **Discount %:** percentage discount for item/service if applicable
- **Total Discount Amt.:** total amount of discount – populate based on cost and discount %
- **Total:** COMMBUYS automatically updates
- **UNSPSC:** each item/service is required to have a corresponding UNSPSC code. Use the magnifying glass icon to search and select the most appropriate UNSPSC class (more detail on Step 8)
- **Freight:** enter freight costs if known

**NOTE:** Fields marked with an asterisk (\*) are required.

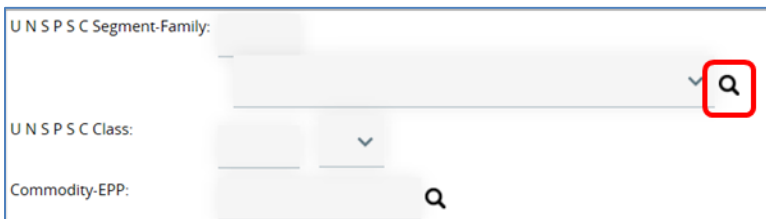
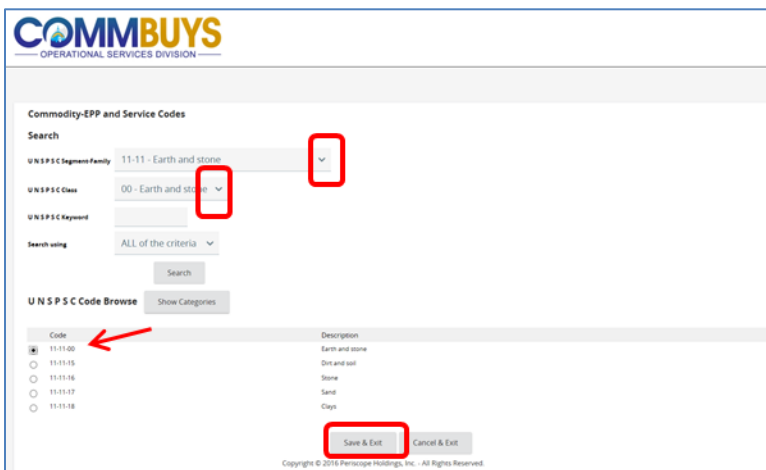


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#### Step 7: Adding UNSPSC Codes

1. Click on the magnifying glass icon to add UNSPSC codes to the item/service.
2. The Search Code screen displays. Click on the dropdown arrows next to the **UNSPSC Segment-Family** and **UNSPSC Class** fields to find the best code.
3. Click on the radio button to the left of the desired code.
4. Click on the **Save & Exit** button to return to the Items tab.

Code	Description
<input checked="" type="radio"/> 11-11-00	Earth and stone
<input type="radio"/> 11-11-15	Dirt and soil
<input type="radio"/> 11-11-16	Stone
<input type="radio"/> 11-11-17	Sand
<input type="radio"/> 11-11-18	Clays

#### Step 8: Saving the Item Information

After each item is added to the requisition, there are five options:

- **Save & Add New** – saves the item to the requisition and opens a new item entry so additional items can be added
- **Save & Exit** – saves the item, closes the item entry page, and returns to the Requisition Items General tab
- **Save & Continue** – saves the item and remains on the item entry page
- **Reset** – removes the item from the requisition without saving it
- **Cancel & Exit** – cancels the item and exits from the item entry page.

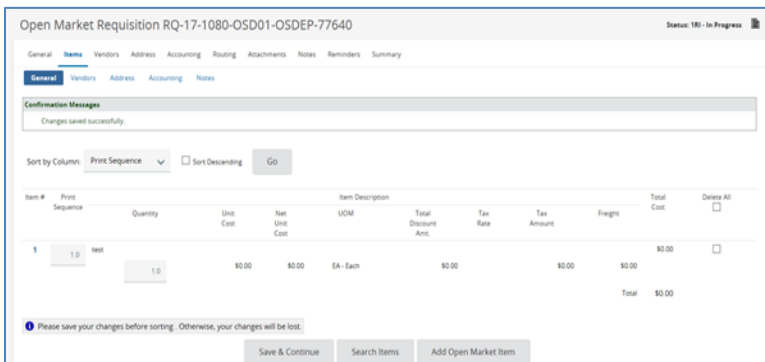
Repeat steps 6 through 8 until item entry is complete, then click on the **Save & Exit** button.



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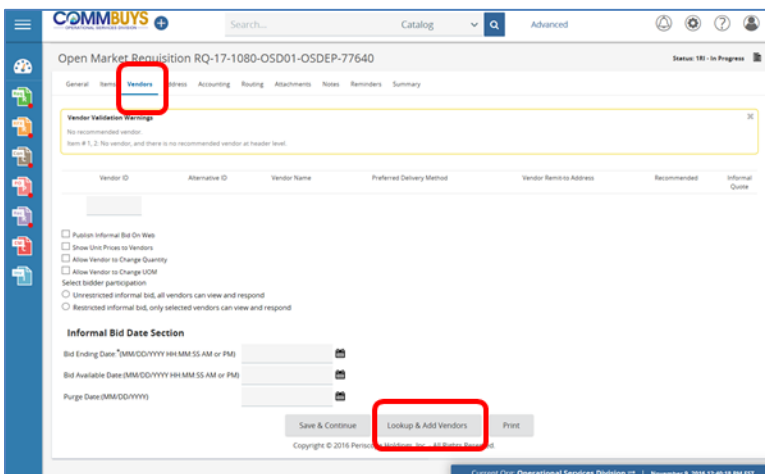
### Step 9: Verifying the Item Information

- Once complete, the Items General screen displays the entered data.



### Step 10: Looking Up Vendors

On the Vendors tab, click on the **Lookup & Add Vendors** button at the bottom of the page.



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#### Step 11: Searching for Vendors

A popup window appears with a Vendor advanced search page.

Enter vendor search criteria, and click the **Find It** button.

Alternatively, scroll to the bottom of the page and click on the **Find Vendors for All Commodity-EPP on the Req** button.

Lookup & Add Reference Vendors - Requisition RQ-17-1080-OSD01-OSDEP-77640

Vendor Lookup:

Search Using:

Find It Clear

Search Fields:

Vendor ID  Vendor Name

Vendor Tax ID  Vendor Legal Name

Vendor Keyword  Alternate ID

ZIP Code  County

State

☐ Emergency Supplier ☐ Reference Vendor

UNSPSC Segment Family

UNSPSC Class

UNSPSC Keyword

Disadvantaged Business Enterprise

DOB Category

DUNS Number

This is the DUNS number assigned to my Business

Environmentally Preferable Product

Lesbian, Gay, Bisexual and Transgender Owned Business Enterprise

Minority Owned Business Enterprise

Portuguese Owned Business Enterprise

Prompt Pay Discount

Are you interested in partnering as a Prime/Sub contractor?

Geographical Service Area in Massachusetts

Service Disabled Veteran Owned Business

Women Owned Business Enterprise

Business Structure

AGREEMENT AND TERMS OF USE FOR SELLERS

Business Type

Veteran Owned Business Enterprise

Women Non-profit Organization (W/NPO)

Program  Small Business Purchasing Program

Browse by:

Find It Clear

Find Vendors for All Commodity-EPP on the Req Close Window

#### Step 12: Selecting Vendors

The results display with the vendors who selected the same commodity code as the bid item(s).

1. Click the top **Select** button to check and include all the listed Vendors.
2. Click on the **Save & Exit** button to return to the Vendors tab.

Lookup & Add Reference Vendors - Requisition RQ-17-1080-OSD01-OSDEP-77640

Vendor Lookup:

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1 2

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input checked="" type="checkbox"/>	00000224	A. R. Bell, Inc.				271 Nevada Street	Newtownville	MA	Karen Kavaney	(123)456-7890	No
<input checked="" type="checkbox"/>	00004937	A.D. Marketplace Company				158 Tinslet Road	Wareham	MA	Linda Burke	(123)456-7890	No
<input checked="" type="checkbox"/>	00017364	Atty Emergencies Inc.				147 Clay Pt Rd	Marionfield	MA	Jim Rucinski	(123)456-7890	No
<input checked="" type="checkbox"/>	00001067	American Regional Materials, Inc.				34 Prospect Street	Holiston	MA	Michael Brumbar	(123)456-7890	No
<input checked="" type="checkbox"/>	300317	Copier Paper Recycling, Inc.		Dec 28, 2015		205 Loring Industrial Parkway	East Hingham	MA	Daniel P. Bunting	(123)456-7890	No
<input checked="" type="checkbox"/>	00007114	Cosco Trencher Services LLC				201 Green Street	Kingston	MA	William Lyons	(123)456-7890	No
<input checked="" type="checkbox"/>	00000194	Delta Sand and Gravel, Inc.		Aug 26, 2015		PO Box 395	Sunderland	MA	Craig Warner	(123)456-7890	No
<input checked="" type="checkbox"/>	00006285	Forestry suppliers, Inc.		Apr 15, 2016		P.O. Box 8397	Jackson	MS	Deanne Sonson	(123)456-7890	No
<input checked="" type="checkbox"/>	00017527	Hydra Construction Co., Inc.				205 W. Barnes St	Dorchester	MA	Jonathan Hyke	(123)456-7890	No
<input checked="" type="checkbox"/>	00006479	Innovative Municipal Products US, Inc.				PO Box 1484	Dorchester	MA	Jonathan Hyke	(123)456-7890	No
<input checked="" type="checkbox"/>	00006530	K.R. Resonance, Inc.				454 River Road	Glenmont	NY	Sped. At	(123)456-7890	No
<input checked="" type="checkbox"/>	00006242	Kenut Landscape				P.O. Box 879	Assonet	MA	Thomas Copeland	(123)456-7890	No
<input checked="" type="checkbox"/>	00007016	Kingston Corporation		Jan 21, 2015		3 Sunny's Lane	Southwick	MA	Lorraine Keane	(123)456-7890	No
<input checked="" type="checkbox"/>	201739	Lorison Corporation		Aug 11, 2015		Kenut Landscape	PO Box 548				
<input checked="" type="checkbox"/>	00000335	Marathon Metals Inc		Mar 30, 2016		61 Canast Drive	Plymouth	MA	Shirley Dromsner	(123)456-7890	No
<input checked="" type="checkbox"/>	0001597	Mulling & Armitage Landscape Associates, Inc.				3 Beecher Street	Plymouth	MA	Linda Watson	(123)456-7890	No
<input checked="" type="checkbox"/>	00019968	Needful Things Thrift Shop		Sep 21, 2016		po Box 783	Wilmington	MA	Dan Markham	(123)456-7890	No
<input checked="" type="checkbox"/>	00022103	New England Gravel Haulers				420 Pine Street	Leicester	MA	Andrew Armitage	(123)456-7890	No
<input checked="" type="checkbox"/>	300058	New England Recycling Co., Inc.		Oct 5, 2015		123 Main Street	Castle Rock	ME	Leland Guant	(101)555-1234	No
<input checked="" type="checkbox"/>	209393	Pioneer Landscapes, Inc.				38 Winthrop St	Rahoon	MA	John Hunt	(123)456-7890	No
<input checked="" type="checkbox"/>	00005881	Planet Earth Materials				490 Winthrop Street	Taunton	MA	Patricia deSouza	(123)456-7890	No
<input checked="" type="checkbox"/>	300095	Prodark Industries Inc.		Apr 12, 2016		P.O. Box 823	Easthampton	MA	Brian J. Campedelli	(123)456-7890	No
<input checked="" type="checkbox"/>	213487	Providence Analytical Services Inc.		Feb 24, 2015		158 Industrial Parkway	Ashby	MA	Kevin Sarna	(123)456-7890	No
<input checked="" type="checkbox"/>	00010182	Ray Hauling, Inc.		Aug 30, 2015		9 Sears Way	Essex	MA	Michael Durham	(123)456-7890	No
<input checked="" type="checkbox"/>	00006793	Robert B. Orr Co., Inc.		Mar 30, 2016		22 Cummings Park	Weston	MA	Anna Cornier	(123)456-7890	No
<input checked="" type="checkbox"/>						1014 Centre Street	Ludlow	MA	Joanne Martins	(123)456-7890	No
<input checked="" type="checkbox"/>						PO Box 1538	Hanover	MA	Ann Capelton	(123)456-7890	No

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1 2

Save & Exit Save & Continue Save & Next Page Find Vendors for All Commodity-EPP on the Req Close Window

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## Job Aid:

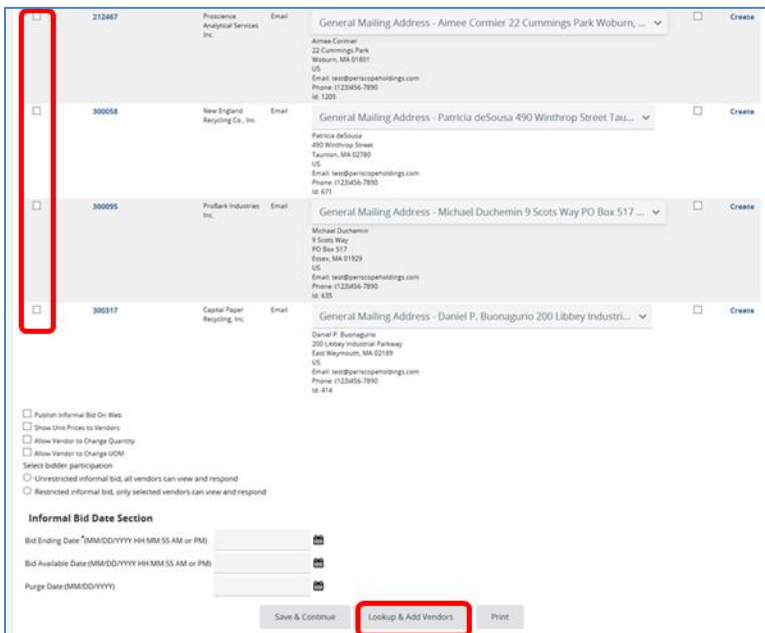
### How to Create a Bid Using a Requisition

#### Step 13: Verifying the Vendors

The **Vendors** tab now displays all of the Vendors you selected.

You can delete vendors by using the left Delete column, and/or you can continue to add Vendors by clicking on the **Lookup & Add Vendors** button.

**NOTE:** Generally, vendors should not be deleted from open bids.



Vendor ID	Vendor Name	Email	General Mailing Address	Create
212467	Providence Analytical Services Inc.		General Mailing Address - Amee Cormier 22 Cummings Park Woburn, MA 01801	Create
300058	New England Recycling Co., Inc.		General Mailing Address - Patricia deSouza 490 Winthrop Street Taunton, MA 01960	Create
300055	ProBank Industries Inc.		General Mailing Address - Michael Duchemin 9 Scots Way PO Box 517 Essex, MA 01529	Create
300317	Capitol Paper Recycling, Inc.		General Mailing Address - Daniel P. Buonagurio 200 Libbey Industrial Parkway East Weymouth, MA 02189	Create

☐ Publish Informal Bid On Web  
☐ Show Unit Prices to Vendors  
☐ Allow Vendor to Change Quantity  
☐ Allow Vendor to Change UOM  
☐ Select bidder participation  
☐ Unrestricted informal bid, all vendors can view and respond  
☐ Restricted informal bid, only selected vendors can view and respond

**Informal Bid Date Section**

Bid Ending Date (MM/DD/YYYY HH:MM:SS AM or PM)   
 Bid Available Date (MM/DD/YYYY HH:MM:SS AM or PM)   
 Purge Date (MM/DD/YYYY)

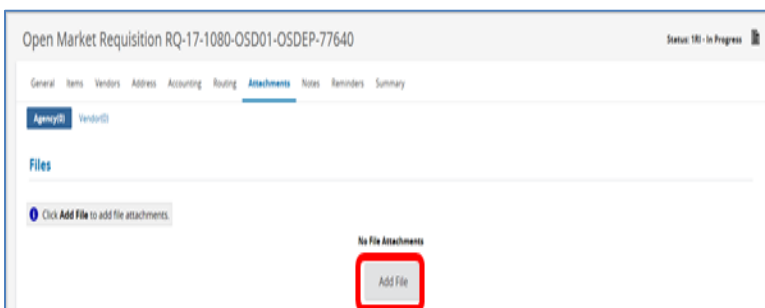
Save & Continue   **Lookup & Add Vendors**   Print

#### Step 14: Viewing the Attachments Tab

1. Click on the **Attachments** tab.
2. If any files auto-attach: review, keep, or delete as necessary.

Attachments include bid attachments and required forms/contract documents

3. Click on the **Add File** button to add a new file.



Open Market Requisition RQ-17-1080-OSD01-OSDEP-77640 Status: 181 - In Progress

General Items Vendors Address Accounting Routing **Attachments** Notes Reminders Summary

Agency(s) Vendor(s)

**Files**

Click Add File to add file attachments.

No File Attachments

**Add File**

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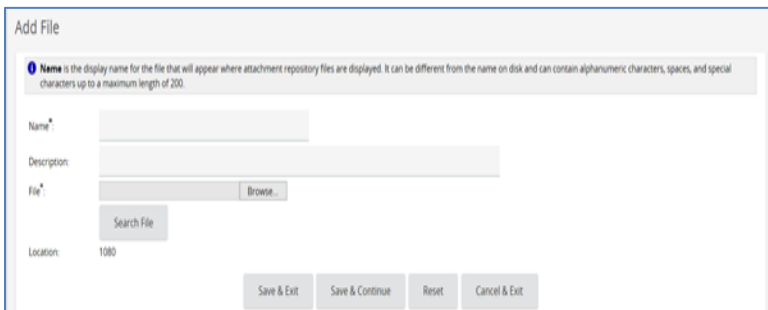
#### Step 15: Adding a File

1. The Add File window opens. To select a file from your desktop, click the **Browse** button labeled the Choose File button if using Chrome). This will search for documents from your computer.
2. Select the desired file.
3. Complete the following fields
  - **Name** – required; but will be populated with the selected file name if left blank
  - **Description** – optional
4. Click on the **Save & Continue** button to add another file or click on the **Save & Exit** button when all files have been added.

**NOTE:** Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the repository, click on the **Search File** button and complete the advanced search criteria.

#### Step 16: Verifying the Attachment

The Attachments tab redisplay with a list of attached files.



**Add File**

**Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name\*:

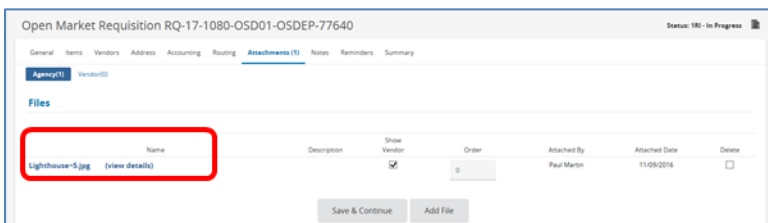
Description:

File\*:  **Browse...**

**Search File**

Location: 1080

**Save & Exit** **Save & Continue** **Reset** **Cancel & Exit**



Open Market Requisition RQ-17-1080-OSD01-OSDEP-77640 Status: 181 - In Progress

General Items Vendors Address Accounting Routing **Attachments (1)** Notes Reminders Summary

Agency(1) Vendor(0)

**Files**

Name	Description	Show Vendor	Order	Attached By	Attached Date	Delete
Lighthouse-5.jpg (view details)		<input checked="" type="checkbox"/>	0	Paul Martin	11/09/2016	<input type="checkbox"/>

**Save & Continue** **Add File**

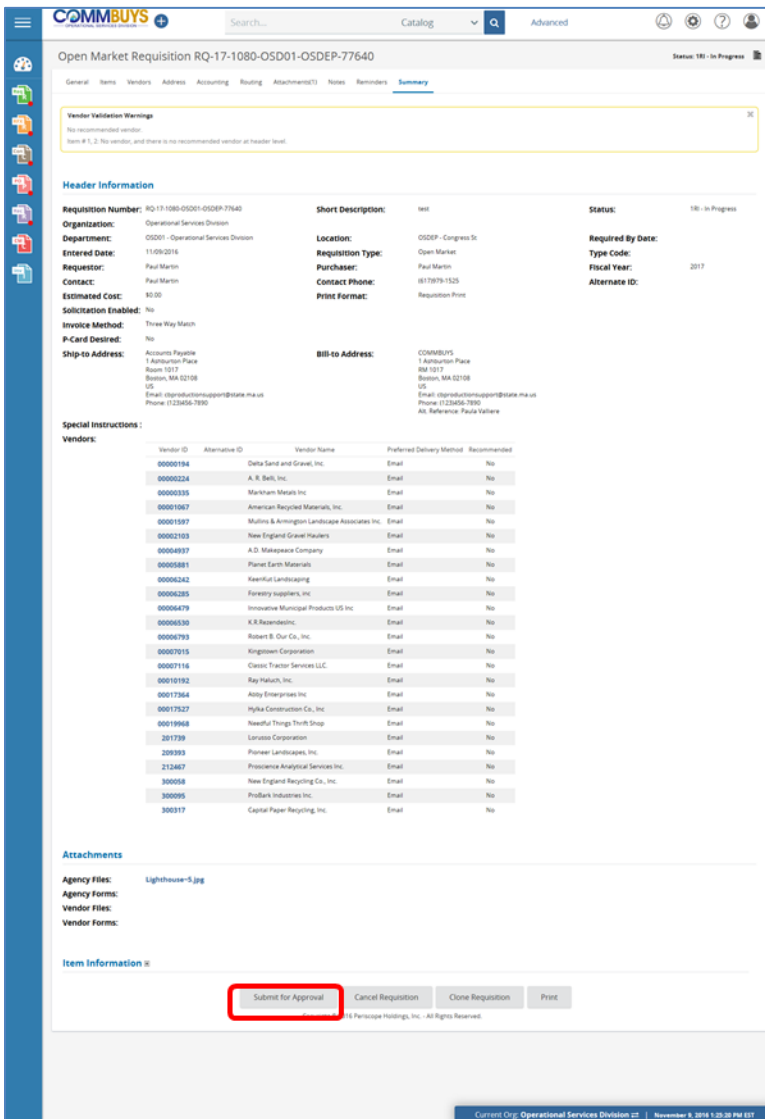
## Job Aid: How to Create a Bid Using a Requisition

### Step 17: Submitting for Approval

1. Click on the **Summary** tab to display a summary view of the completed requisition.

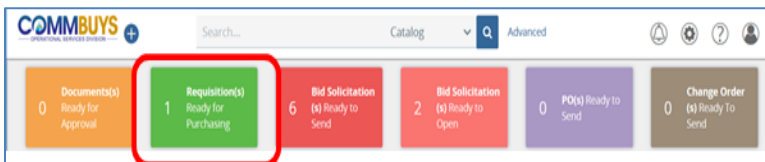
**NOTE:** You can ignore the Vendor Validation Warning at this time. The vendor or vendors will be identified at the time of the bid award.

2. Click on the **Submit for Approval** button at the bottom of the page.



### Step 18: Locating the Requisition

Once approved, locate the approved requisition from the main menu by clicking on the green **Requisition(s) Ready for Purchasing** box. The requisition might also be found in the **Recent Documents** section of the page.

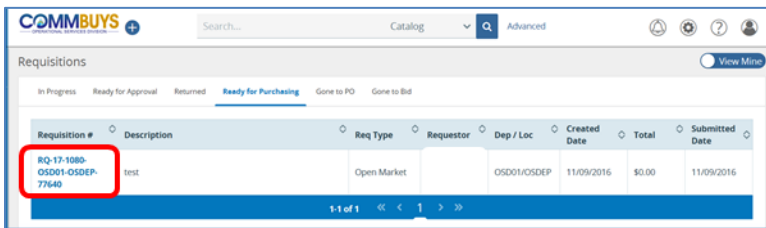


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#### Step 19: Clicking on the Hyperlink

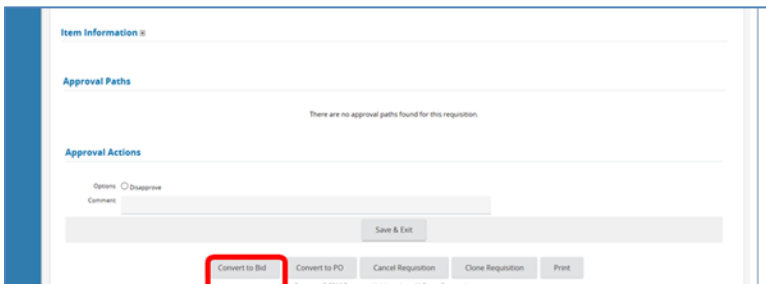
Requisitions meeting the criteria display. Click on the blue hyperlink in the **Requisition #** column to open the desired requisition.



#### Step 20: Converting the Requisition to a Bid

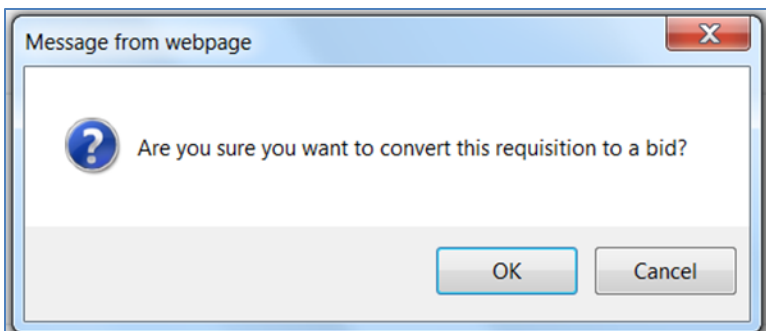
The requisition opens to the **Summary** tab.

1. Scroll to the bottom of the page and click on the **Convert to Bid** button.



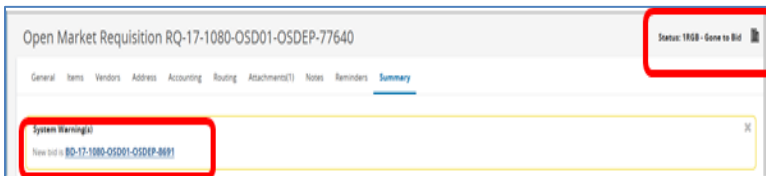
#### Step 21: Verifying the Conversion

A popup message displays asking if you are sure. Click the **OK** button to confirm.



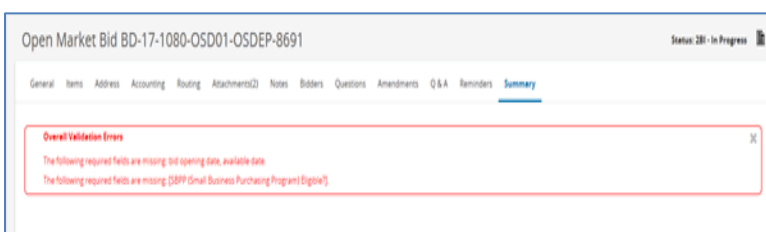
#### Step 22: Opening the Bid

The Requisition screen redisplay with a **Gone to Bid** status. Click on the **blue hyperlink** for the bid.



#### Step 23: Viewing the Bid Summary Screen

The Summary screen opens with a warning for Validation Errors. Click on the **General** tab.



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### Step 24: Completing the Bid General Tab

The **General** tab displays. All information from the requisition is automatically populated into the bid. The fields that require completion include:

- **Available Date** – Enter the date the bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.
- **Bid Opening Date** – Enter the date the bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time.
- **SBPP (Small Business Purchasing Program) Eligible?** Select “Yes” if up to \$150K or “No” if over \$150K or not applicable.

The following options display in the **Purchase Method** dropdown:

- **Open Market:** For a one time purchase/award
- **Contract:** The Contract option should never be selected
- **Blanket:** If the Bid is going to result in a contract award

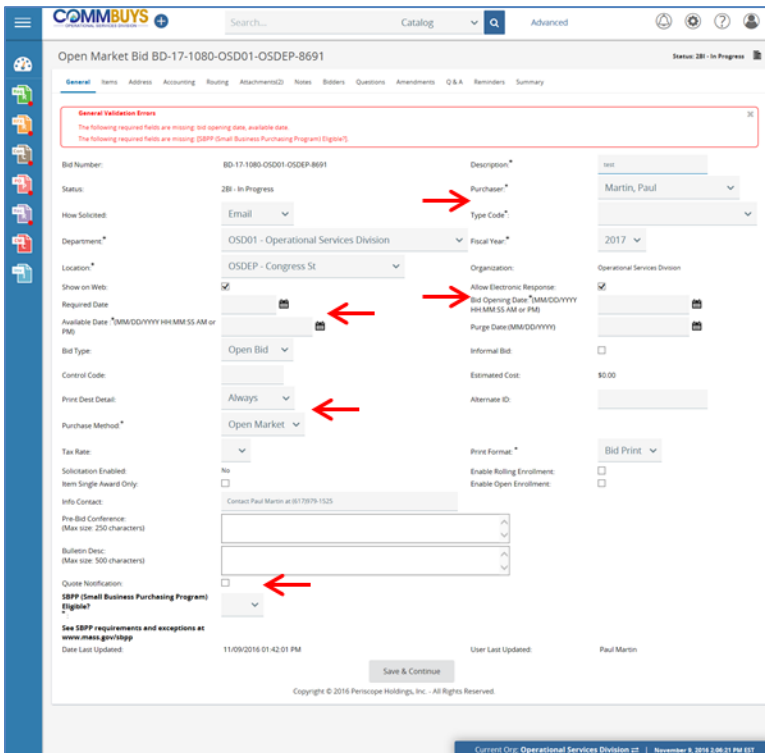
From the **Type Code** dropdown, select one of the following:

- **SS:** (bid for a statewide solicitation)
- **NS:** (bid for a non-statewide solicitation)

Click the **Save and Continue** button to save all changes.

If **Blanket** is selected, a pop-up message appears. Click OK and two new fields display and must be completed:


- **Blanket Begin Date:** (estimated contract begin date)
- **Blanket End Date:** (estimated contract end date)



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#### Step 25: Verifying Tabs




1. Click on the **Items** tab. Verify the items.
2. Click on the **Address** tab. Verify the Ship-to and Bill-to address.
3. Click on the **Attachments** tab. Verify and/or add files to the bid if needed. To add a file, click the **Add File** button.

**NOTE:** The **Amendments** tab has no functionality until after the bid is posted.

**Note:** Review all information on the above tabs to ensure data is imported accurately from the Requisition.

#### Step 26: Verifying the Bidders Tab



Click on the **Bidders** tab. There is no Vendor tab on the Bid. COMMBUYS now refers to them as Bidders. All Vendors entered on the requisition will now be listed as Bidders.

In most cases, the bid will be open, so there is no need to click either radio button for Unrestricted or Restricted bid.

- If a restricted bid is desired so that only selected vendors can view and respond, click the radio button next to **Restricted** bid

If you want vendors to see your price, click on the **Show Unit Prices to Vendors** checkbox, and deselect the **Hide Bid Holder List on Vendor Side** checkbox.

To add more Bidders, click the **Lookup & Add Vendors** button.

If any changes have been made click the **Save & Continue** button.

## Job Aid:

### How to Create a Bid Using a Requisition

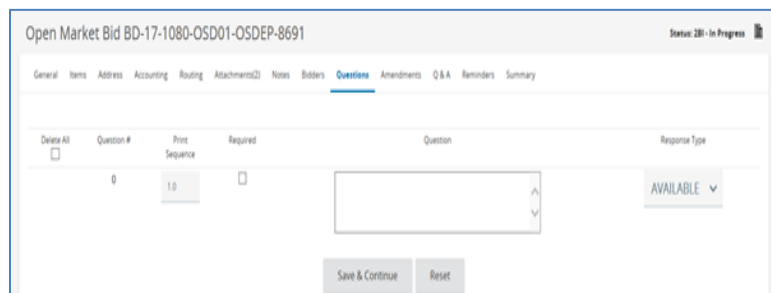
#### Step 27: Completing the Questions Tab

Ask vendors questions by entering text in the **Question** field.

Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.

Select a value from the **Response Type** drop-down list to establish a format for the vendor response.

Select the **Save & Continue** button to save your entries.



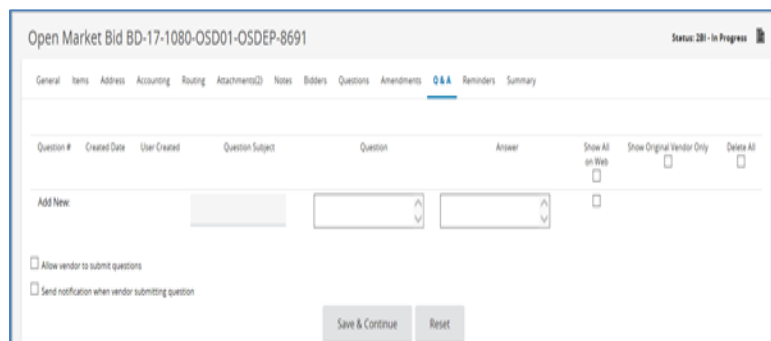
#### Step 28: Completing the Q&A Tab

Click on the **Q&A** tab. To dialogue with vendors, click on the **Allow vendor to submit questions** checkbox.

If you would like COMMBUYS to notify you when a vendor submits a question, click on the **Send notification when vendor submitting question** checkbox.

If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.

If you wish to display the dialogue on the Web, select the **Show All on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.



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### Step 29: Completing the Reminders Tab

If desired, click on the **Reminders** tab to send a reminder to yourself or another person within your organization.

Use the calendar icon in the **Due Date** field to select the date of the reminder, then enter your reminder text in the **Comment** field.

Select yourself or another internal recipient in the dropdown menu next to the **Remind Whom** field.

If you would like to send a "tickler" or pre-notification in advance of the reminder, enter the number of days of the pre-notification in the **Days Prior to Reminder** field.

If you would like the reminder send via email, click on the **Send Email** checkbox.

When complete, click on the **Save & Continue** button.

### Step 30: Submitting for Approval

Click on the **Summary** tab to review the bid information.

Scroll to the bottom of the page and click on the **Submit for Approval** button.

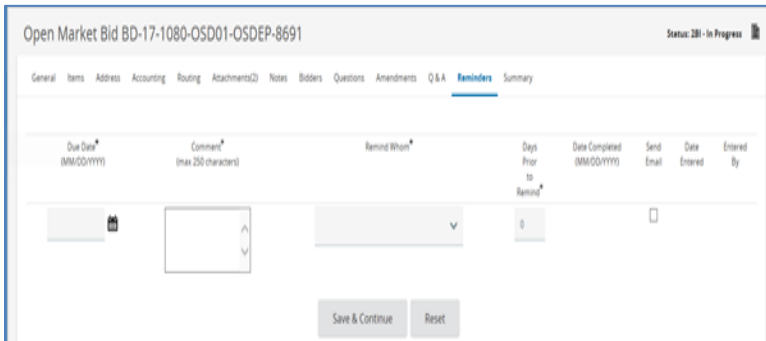
### Step 31: Sending the Bid

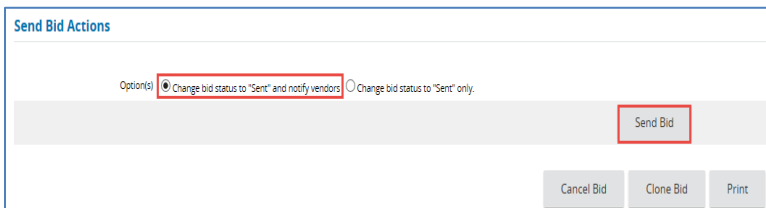
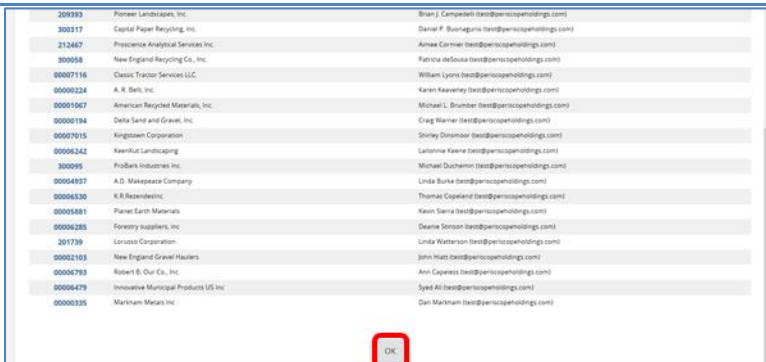
Once the bid is approved, return to the Summary page, scroll to the bottom of the page, and click on the **Send Bid** button.

This will notify any vendor listed on the bid as well as post it on COMMBUYS for all vendors to search and bid on.

### Step 32: Verifying the Bidders

The list of vendors (bidders) to notify by email displays. Click on the **OK** button to verify.







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